CAPPS HR/Payroll User Group Meeting Minutes
Tuesday, June 28, 2022
9–11 a.m.
(Webinar Only)

I. **Welcome/Announcements** (Saundra Farley)

- User Group meeting materials for today's are posted on FMX.
    - To be added to the user group distribution list, email the CAPPS Governance and Communications team at: CAPPS.CGC.BA@cpa.texas.gov

II. **Production Update: HR/Payroll Support Requests (SRs)** (Saundra Farley)

- **SR Summary and Trend Report**
    - Reviewed the CAPPS HR/Payroll Summary and Trend Report 06/28/2022 document.
        - There were 626 active SRs with 46 in high priority status in May.
        - As shown on the trend chart, there were 767 SRs opened and 733 closed. This trend reflects an uptick in opened and closed tickets compared to this month last year due to the Time and Labor Time in a Needs Approval clean up tickets, which are expected to be closed early next month.

- **Governance Approved Enhancements**
    - The CAPPS HR/Payroll Governance Approved SRs 04/26/2022 document was reviewed. Updates since the last meeting are identified with an asterisk (*) and are bolded.
        - SR 30574 is now *Complete* and migrated to production on June 1. This SR was an update to add the start (effective) date to the *Candidate CSW Progress Details* report in *CAPPS Recruit OBI*.
        - SR 28607 added a new view to the *Veteran Details* report to allow format friendly exporting. This SR was *Completed* as of June 1.

- **Required Maintenance**
    - The CAPPS HR/Payroll Required Maintenance 06/28/22 document was not reviewed but can still be found with all materials on FMX. There were no updates to discuss due to code freezes for the upcoming deployment.

III. **Upcoming Vote: SRs Submitted to Governance** (Richard Kral & Kevin Brown)

- Reviewed the CAPPS HR/Payroll SRs Submitted to Governance 06/28/22 document.
    - SR 24276 adds a query to the *Performance Management* module that provides checkpoint statuses for managers to use as guidelines once configured in the agencies templates.
    - SR 1451 is for the *HR/Payroll* module that adds a new Employee Self-Service (ESS) functionality for employees to self-report to the highest education level achieved on the ESS page.
    - The CAPPS Support team recommends approval for these SRs.

IV. **Project Update: CAPPS HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard** (Gunjan Sahni)

- Reviewed the CAPPS HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard 06/28/22 document.
- The code move date is July 05, 2022. The implementation date is July 11, 2022. The project metrics are green and on track.
- Key items:
    - This project is now at 85% completion.
    - Train-the-trainer activities are complete.
    - System Testing is now complete.
    - UAT ended June 24.
    - Deployment preparations underway.

V.   Discussion Topic: FISCAL 2022 Fiscal Year-End Activities (Stacey Hassin, Danette McWilliams, Marissa Hoffman, Erika CondadoAlvarado)

- A walkthrough of the Fiscal Year-End (FYE) Processing schedule, activities prior to the 2022 FYE rollover and provided activities that follow the 2022 FYE Rollover.
- 2022 FYE Processing schedule
  - Normal processing is available until Aug. 31 at 5 p.m.
  - Send all transactions processed on Aug. 31 to SPRS before the CAPPS team begins the FYE Process.
  - The system will be unavailable from Aug. 31 at 5 p.m. to Sept. 3 at 8 a.m.
  - Normal CAPPS activities will resume on Sept. 3 at 8 a.m.
- Activities Prior to the 2022 FYE Rollover
  - Application Service Provider Solution Center (ASP SC) SR tickets will be opened for each agency by the CAPPS Production Support team during the month of July.
  - All communication and documentation regarding 2022 FYE will be distributed through those SRs. Therefore, ensure a representative for the agency is assigned to monitor the SR.
  - The first activity that needs to be sent to the CAPPS Production Support team is the Mass Position Data Changes (Reorg).
    - If the agency plans to make Mass position Data Changes effective Sept. 1, contact the CAPPS Help Desk via the ASP SR ticket to receive the proper template for use.
    - If a large number of changes (100 or more) is expected, the CAPPS team will load the agencies Fiscal 2023 mass reorg spreadsheet during the outage window that begins on Aug. 21, 2022.
  - The commitment accounting phase is when agency's fiscal 2023 department budgets are updated and established in CAPPS HR/Payroll, effective Sept. 1.
    - In order for the budgets to be established, each agency needs to notify the CAPPS team via the FYE ticket with the following:
      - Little/No changes – Copy the agency's most current 2022 budget row to 2023 and fix minor changes –OR–
      - Large number of changes (100 or more) – Agency needs to upload the *Budget Load Spreadsheet (BLS)* to the SR for the CAPPS team to use for the 2023 budget load.
    - Important dates to be aware of:
      - Aug. 5, 2022 – Ensure mass reorg spreadsheets are loaded into the ASP ticket so the CAPPS team may perform test and provide results to agencies for validation.
      - Aug. 22, 2022 – Upload final mass reorg spreadsheets to ASP ticket. Also, ensure the preliminary BLS is uploaded to the ASP ticket so testing can begin.
      - Aug. 31, 2022 – Upload final BLS to ASP ticket.
  - Position Data Changes effective prior to Sept. 1 and job data actions effective on or before Aug. 31 (including terminations) must be made prior to the Aug. 31 shutdown at 5 p.m.
    - Agencies must inactivate any active positions (that will be inactive beginning Sept. 1) before Aug. 31 at 5 p.m.
    - Any position data changes that are not made by the deadline must be communicated to the CAPPS team via the "FYE" ASP ticket.
  - Disciplinary Actions and Temporary Assignments
    - The CAPPS team will provide each agency with a Disciplinary action and temporary assignment spreadsheet via the ASP ticket.
    - Employees that are on Disciplinary Reduction (027) or Temporary Assignment (041) must be restored to original status prior to the Aug. 31 shutdown at 5 p.m.
    - If the employee's disciplinary reduction or temporary assignment is not due to end until after Sept. 1, still restore to original status before the shutdown and, once complete, inform the CAPPS team to place the employee back on disciplinary reduction or temporary assignment via the "FYE" ASP ticket.

- o Agency Responsibilities prior to the FYE Rollover
  - Ensure all employees are aware of the outage.
  - Inform all managers and employees that all date-sensitive transactions for August must be processed before the outage
  - Make all date sensitive entries prior to the outage.
- • Activities After the 2022 FYE Rollover
  - o Beginning Sept. 1, validate all employees have been accurately updated to the new fiscal year, by verifying the following:
    - All active employees have an action reason (F23) row.
    - Disciplinary Reduction (027) and Temporary Assignment (041) actions has been returned to proper employees.
    - Any terminations effective Sept. 1 or earlier should not have a 9/1 F23 row.
  - o Benefit Elections
    - The ERS open enrollment file will run on Sept. 2. Once the file is received on Sept. 3, agencies need to review the CAPPS ERS Inbound Results for accuracy.
    - An ERS Processing desk aid is available to all agencies just submit the request via the "FYE" ASP ticket.
  - o Benefits – Annual Base Benefits Rates
    - Agencies have through the end of September 2022 to process employee salary actions that were dated to be effective Sept. 1. This ensures that the Sept. 1 Annual Base Benefit Rates (ABBR) or Insurance Salary was correctly calculated in CAPPS. **Please Note:** Cassette number one transactions should not be entered before fiscal year conversion is completed.
    - The Insurance Salary file will be created multiple times during the month of September starting Sept. 2 to capture accurate insurance salary rates.
    - The ERS created error file will be provide to agencies via the ASP ticket. Agencies need to review and address the discrepancies in the file as soon as possible for updates to be made before the end of the month.
    - A final file will be generated at the end of September.
  - o Payroll
    - When processing the September payroll be sure to run the Pre-Distribution Audit Report (PDAR) to validate payroll funding and ensure no errors exist.
    - If an error occurs when running the PDAR please review the budget load for accuracy. If it continues or assistance is needed, contact the CAPPS Help Desk.
    - **Please Note:** PDAR exceptions must be resolved prior to confirming the September payroll.
  - o Time and Labor – **Annual to Sick Leave Conversion**
    - Inform all employees that all leave entries must be submitted and approved prior to Sept. 1.
    - Evaluate the annual leave balance for any employee terminations with an effective date of Sept. 2 (or later) to determine if the *Annual to Sick Leave Conversion* has been processed. If not, a manual conversion is applicable.
    - Complete the *Annual to Sick Leave Conversion* process. **Please Note:** this process can only be done once. If there are any updates afterward, it needs to be done manually.
  - o Time and Labor – **Leave Liability Report**
    - Deployed CAPPS agencies prior to fiscal 2022 will have the ability to run the *Leave Liability* report in CAPPS.
    - July 2022 deploying agencies will receive the *Leave Liability* report information from the CAPPS Help Desk support staff no later than Friday, Sept. 9, via the "FYE" ASP ticket. **Note:** Starting in fiscal 2023, agencies that deployed July 2022 will have the ability to run the *Leave Liability* report.

- Time and Labor – **Sick/Family Leave Pool**
  - This year will be the first time running the family leave pool process.
  - Although the *Sick Leave and Family Leave Pool* are on the same page, each one must be run separately.
  - Before running the process, ensure all activity is up to date so the updated balance will be accurate for the new fiscal year.
  - The process must be rerun anytime retroactive prior FY SLP actions are entered in TL.
- Time and Labor – **Emergency Leave Reporting**
  - Emergency Leave reporting for fiscal 2022 is due on Oct. 1.
  - Leave data is loaded to the *Emergency Leave Reporting* web application on Sept. 23.
  - Please run the TX_TL_SB73_EMERGENCY_LEAVE_RPT query prior to Sept. 23, so all necessary corrections can be made, ensuring an accurate update for the new fiscal year.
  - If adding new users to the *Emergency Leave Reporting,* submit a ticket for access through the agency's Security Coordinator as early as possible — the access setup takes 2 to 3 days to complete. It is recommended to submit the request by Sept. 15.
  - Agencies deploying July 2022 will have the emergency leave data (that was recorded in USPS or provided to the CAPPS team during deployment) converted into CAPPS and available via the CAPPS query.
- Time and Labor – **Military Rollover**
  - The federal fiscal year ends on Sept. 30. Starting on Oct. 1, agencies will be able to complete the military rollover process.
  - Ensure all military leave has been entered before running the process.

VI. **Discussion Topic: CAPPS Recruit – Disable *Quick Search* Feature** (Rebecca Kelly)
- SR 37613 is a request to remove/disable the *Quick Search* feature from users with Manager Self Service (MSS) Recruit and Recruiting Coordinator user types.
  - This change aligns security with Interviewer and Approver user types.
  - The ability to review other candidates' general profile or using quick search for requisition will no longer be available to MSS Recruit/Recruiting Coordinator users.
  - Recruiters/Recruiter Administrators/Inquirers will retain the same access.
- Rationale for Current Configuration
  - MSS Recruit/Recruiting Coordinator users are able to view general candidate profile in order to contact for sourcing purposes. This is used for candidates that have not yet applied to a position but has information in the system. Using this information CAPPS Recruit users may send correspondence inviting candidates to apply for a job.
  - Users will not have access to a candidate's job submissions unless the user is the own of the job requisition.
- Proposed Permissions to be Revoked
  - Access to candidate *Quick* and *Specific* search
  - Find results for internal and external candidates.
  - Access requisition search.
  - Access to *Advanced* search.
  - Selecting attributes for the following:
    - Required
    - Desired
    - Excluded
  - Multiple searches in the same query.
  - Access to competencies and questions criteria.

- Request for feedback
  - SR 37613 may potentially become a voting item in the upcoming user group meeting. For the information presented today regarding the SR, the CAPPS team is asking for feedback on whether or not this change would have a negative impact on the agency's MSS Recruiter/Recruiting Coordinator.
  - Please submit feedback via the ASP ticket within the next two weeks.

VII. **Discussion Topic: Fiscal 2022 Fluid Modifications** (Erika CondadoAlvarado)
- Due to the Fiscal 2022 fluid modifications the CAPPS system will be unavailable for the next two weekends. Downtime periods are:
  - **Code Move**: Friday, July 1 at 5 p.m. — Tuesday, July 5 at 8 a.m.
  - **Deployment**: Friday, July 8 at 5 p.m. — Monday, July 11 at 8 a.m.

- Fluid Upgrade Reminders and Dates
  - Timesheet Entries and Approvals
    - All entries for June and previous months must be entered and approved by June 30.
    - Entries in *Needs Approval (NA)* status will not transfer to the *Approval Workflow Engine (AWE)* or the *Fluid timesheet* and will need to be re-entered once the system comes back up.
  - Time Administration Process
    - Users have access to the system on July 1. However, any entries not completed by June 30 should wait until the system is back up on July 5.
    - The *Nightly Batch Time Administration* will not run until July 5.
  - Payroll Processing — All payrolls must be approved by 5 p.m.

- Oracle PeopleSoft Upgrades for Fiscal 2022
  - **PeopleTools** – Version 8.57.18 to 8.59.08 includes enhancements to fluid homepages.
  - **Image** – Upgrade from 32 to 40 includes additional functional features

- Time and Labor (TL) Modifications
  - **Fluid Timesheet** — The custom monthly timesheet will be retired and be replaced with the new fluid weekly timesheet. Reference: SR 31678
  - **Fluid Reported Time Approvals** — Implementing AWE for approval routing once time is entered by employees. Reference: SR 32097
  - **Fluid Time and Labor WorkCenter** — Provides quick navigation to various TL pages and components. Reference: SR 31679
  - **Fluid Manage Exceptions** — Will become available to time administrators and superusers. Reference: SR 31683
  - **Time Summary and Time Calendar Views** — Provide summary and views of *Reported Time* and *Payable Time* for selected employees. Reference: SR 32098

- Job and Position Data Modifications
  - **Fluid Job Data** — Removing the Classic *Job Data* component access and implementing the *Fluid Job Data* for entering job transactions. Reference: SR 31675
  - **Fluid Position Data** — Removing the Classic *Position Data* component access and implementing the *Fluid Position Data* for entering position transactions. Reference: SR 31677

- Payroll Modifications
  - **Fluid W-2/W-2c View Form** — Forms will be converted to the delivered fluid page with minor changes. Reference: SR 31685
  - **Fluid Direct Deposit Changes** — Oracle has decommissioned support on the classic *Direct Deposit* page as of December 31, 2021. The new fluid direct deposit changes will be minor and have the same look and feel for the employee and superuser views. Reference: SR 31686

- Enhancement Spotlight: **Homepage**
  - The global search bar appears in the top center of the homepage.
  - A quick access bar was added to the homepage. The icon can be found on the left side of the page and can be used to navigate to favorites and recently used items.
  - All notifications is displayed on the homepage in the new notifications panel. Located in the upper right corner of the page.
  - Two different navigations have been provided to access dashboards:
    - A dropdown menu in the top left corner.
    - A page navigation toggle in the top right corner.
- Enhancement Spotlight: **NavBar**
  - The navigation bar has a new image of the recently visited, favorites and menu tiles and items.
  - Menu folders/items can be displayed in alphabetical or standard order, depending on user preference.
  - Breadcrumbs are displayed, allowing the user to navigate back through the menu hierarchy.
- Enhancement Spotlight: **Fluid Approval Tile**
  - Now available on manager's dashboards.
  - Allows approvals for different modules on one page.
  - Allows managers to view line information, printable versions and the comments and attachments.
  - Number of pending approvals is displayed on the Approval Tile icon.
- 2022 Modifications Resources
  - Documents Distributed
    - Many document resources have been sent out via emails as early as May 9 through June 22.
    - These resources include but is not limited to scripts, desk aids, and presentations.
  - Posted Materials and Links
    - In addition to the distributed materials many of the resources can also be found posted on the [CAPPS HR/Payroll User Group Meetings](#) page on FMX. Previous User Group meeting materials can be found under the Past CAPPS HR/Payroll User Group Meetings section.
    - The links for the *Deployment UAT Environment (UAT3)* and UAT ASP Solution Center sites were sent via email on May 9.
    - To request copies of any previously distributed materials, please contact the CAPPS Governance and Communications team at CAPPS.CGC.ba@cpa.texas.gov for assistance.

VIII. **Discussion Topic: HR Fluid Navigation Demo** (HR Support Team)
- The HR/Payroll CAPPS Support team showed a demonstration of the new fluid navigation, highlighting the features discussed in the Fiscal 2022 Modifications presentation.

IX. **Upcoming Meeting**
- Tuesday, July 26, 2022 — CAPPS HR/Payroll User Group meeting.